



## Duty Statement

Request for Personnel Action (RPA) Number 2122-02704	Effective Date
Classification Title Senior Compliance Representative (SCR)	Position Number 564-646-8620-001
Working Title Field Collector	Bureau and Section Field and Complex Account Collection Bureau

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

### General Statement

This is an advanced journey person level position. Under the general supervision of an Administrator I in the Los Angeles Field Office, the Field Collector independently performs the more complex Personal Income Tax (PIT) and Business Entity (BE) field collection accounts. The Field Collector uses advanced technical collection skills, the knowledge of all phases of debt collection, tax compliance and taxpayer education while adhering to policies, procedures following California's Revenue and Taxation Code, and is responsible for resolving collection accounts by field contact. Taxpayer contact will be made via field visit, public counter contact and telephone contact. Field Collectors are required to meet all requirements of Policy File 5035. Appointment to and continuation in this position requires that the incumbent possess a valid California driver license and proof of vehicle insurance.

### Essential Functions

Percentage	Description
45%	Determine if and when involuntary collection action is appropriate for sensitive, high dollar, or complex cases, such as Order to Withhold Taxes, the filing of liens, suspension of corporations, or the determination that field action is appropriate. Perform detailed account analysis for sensitive, high dollar, or complex cases while using system tools and unit procedures, to locate assets and to determine appropriate field collection actions which may include subpoenas, nominee liens, ex-parte orders, and asset seizures. Ensure program expectations including productivity, responsibility, quality, inventory management and field time for Field Collectors. Review sensitive, high dollar, or complex Filing Enforcement (FE) Assessments for validity and handle liability disputes, explain filing requirements, assessments and negotiate payment.
25%	Perform extensive account analysis to locate assets for seizure, third parties, and financial information. Confer with department experts, legal and investigation staff, collection advisory team and audit staff as necessary to resolve the more complex issues. Respond to taxpayer issues and correspondence and follow up timely with a plan of action.
20%	Conduct field visits and complete field Action Requests to gain compliance, locate the taxpayer and locate assets and third party contacts.
5%	Represent FTB as a hearing officer for third party claims, Frivolous Activity Non-Complier (FAN), and Earning Withholding Earnings for Taxes (EWOT). Provide support and act as a Subject Matter Expert for central office collectors. Assist with projects and/or issue papers as assigned. Mentor new employees and provide support as needed for central office. Assist with projects and/or issue papers as assigned.

## Marginal Functions

Percentage	Description
5%	Assist at the Public Counter as a back-up or as a technical resource. Assist with projects as assigned. Mentor new employees as needed. Attend various meetings and facilitate staff meetings.

**Employee:** I confirm that I have read and understand the described duties and functions of this position.

\_\_\_\_\_  
Name (Print)                      Signature                      Date

**Supervisor:** I certify that the above information accurately represents the described duties and functions of this position.

\_\_\_\_\_  
Name (Print)                      Signature                      Date